



C o u n t y o f S a n L u i s O b i s p o

## **GENERAL SERVICES AGENCY**

Janette D. Pell, Director

Helen McCann, Department Administrator

### **REQUEST FOR PROPOSAL PS-#1099 California State Lobbyist and Advocacy Services**

September 2, 2010

The County of San Luis Obispo via the Administrative Office is currently soliciting proposals for professional services for California State lobbyist and advocacy services.

Each proposal shall specify each and every item as set forth in the attached specifications. Any and all exceptions must be clearly stated in the proposal. Failure to set forth any item in the specifications without taking exception may be grounds for rejection. The County reserves the right to reject any and all proposals and to waive any irregularity or informality in any proposal or in the Request for Proposal process, as long as, in the judgment of the County, such action will not negate fair competition and will permit proper comparative evaluation of the proposals submitted.

This Request for Proposal is posted on the County's Purchasing website at [http://www.slocounty.ca.gov/GSA/Purchasing/Current\\_Formal\\_Bids\\_and\\_Proposals.htm](http://www.slocounty.ca.gov/GSA/Purchasing/Current_Formal_Bids_and_Proposals.htm). Any changes, additions, or deletions to this Request for Proposal will be in the form of written addenda issued by the County. Any addenda will be posted on the website. Prospective proposers must check the website for addenda or other relevant new information during the response period. The County is not responsible for the failure of any prospective proposer to receive such addenda. All addenda so issued shall become a part of this Request for Proposal.

If your firm is interested and qualified, please submit five (5) copies and 1 electronic copy in Microsoft Word and Adobe RFP formats on CD of your proposal by 3:00 p.m. on Friday, October 15, 2010 to:

County of San Luis Obispo  
Phill Haley, GSA - Purchasing  
1087 Santa Rosa Street  
San Luis Obispo, CA 93408

If you have any questions about the proposal process, please contact me. For technical questions and information contact Phill Haley at (805) 781-5904.

All questions pertaining to the content of this Request for Proposal must be made in writing via e-mail to Nikki Schmidt at: [nschmidt@co.slo.ca.us](mailto:nschmidt@co.slo.ca.us). All questions will receive a response within five (5) business days. The question and its response will be posted (anonymously) on the site: [http://www.slocounty.ca.gov/GSA/Purchasing/Current\\_Formal\\_Bids\\_and\\_Proposals.htm](http://www.slocounty.ca.gov/GSA/Purchasing/Current_Formal_Bids_and_Proposals.htm). The County reserves the right to determine the appropriateness of comments / questions that will be posted on the website.

PHILL HALEY  
Buyer – GSA - Purchasing  
[phaley@co.slo.ca.us](mailto:phaley@co.slo.ca.us)

## California State Lobbyist and Advocacy Services

**LOCAL VENDOR PREFERENCE**

The County has established a local vendor preference. When quality, service, and other relevant factors are equal, responses to Requests for Proposals will be evaluated with a preference for local vendors. Note the following exceptions:

1. Those contracts which State Law or, other law or regulation precludes this local preference.
2. Public works construction projects.

A "local" vendor preference will be approved as such when, 1) The vendor conducts business in a fully staffed office with a physical address within the County of San Luis Obispo; 2) The vendor holds a valid business license issued by the County or a city within the County; and 3) The vendor has conducted business at the local address for not less than six (6) months prior to the due date of this Request for Proposal.

Proposals received in response to this Request for Proposal will be evaluated by the Selection Committee considering the local vendor preference described above when quality, service and other relevant factors are equal. The burden of proof will lie with proposers relative to verification of "local" vendor preference. Should any questions arise, please contact a buyer at (805) 781-5200.

	YES	NO
Do you claim local vendor preference?		
Do you conduct business in an office with a physical location within the County of San Luis Obispo?		
Business Address: _____		
Years at this Address: _____		
Does your business hold a valid business license issued by the County or a City within the County?		
Name of Local Agency which issued license: _____		

Business Name: \_\_\_\_\_

Authorized Individual: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Dated: \_\_\_\_\_

## California State Lobbyist and Advocacy Services

**PROPOSAL SUBMITTAL AND SELECTION**

1. All proposals, consisting of five (5) copies (double sided), and 1 (One) electronic version in both Microsoft Word and Adobe PDF formats on CD must be received by mail, recognized carrier, or hand delivered no later than 3:00 p.m. on Friday, October 15, 2010. Late proposals will not be considered and will be returned, unopened.
2. All correspondence should be directed to:

San Luis Obispo County  
General Services Agency  
1087 Santa Rosa Street  
San Luis Obispo, CA 93408  
ATTENTION: PHILL HALEY  
Telephone: (805) 781-5904
3. All costs incurred in the preparation and submission of proposals and related documentation will be borne by the proposer.
4. All proposals should be printed double sided.
5. Selection of qualified proposers will be by an impartial Selection Committee using an approved County procedure for awarding professional contracts. Selection will be made on the basis of the proposals as submitted, although the County reserves the right to interview applicants as part of the selection process. The proceedings of the Selection Committee are confidential, and members of the Selection Committee are not to be contacted by the proposers.
6. This request does not constitute an offer of employment or to contract for services.
7. The County reserves the option to accept or reject any or all proposals, wholly or in part, received by reason of this request, and make more than one award, or no award, as the best interests of the County may appear.
8. All documents submitted to the County in response to this Request for Proposal will become the exclusive property of the County and may be returned to the proposer or kept by the County, in the County's sole discretion.
9. All proposals shall remain firm for ninety (90) days following closing date for receipt of proposals.
10. The County reserves the right to award the contract to the firm who presents the proposal which in the judgment of the County, best accomplishes the desired results, and shall include, but not be limited to, a consideration of the professional service fee.
11. Selection will be made on the basis of the proposals as submitted. The Selection Committee may deem it necessary to interview applicants. The County of San Luis Obispo retains the right to interview applicants as part of the selection process.

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12. Any contract awarded pursuant to this Request for Proposal will incorporate the requirements and specifications contained in this Request for Proposal. All information presented in a proposer's proposal will be considered binding upon selection of the successful proposer, unless otherwise modified and agreed to by the County during subsequent negotiations.
14. Under the provisions of the California Public Records Act (the "Act"), Government Code section 6252 et seq., all "public records" (as defined in the Act) of a local agency, such as the County, must be available for inspection and copying upon the request of any person. Under the Act, the County may be obligated to provide a copy of any and all responses to this Request for Proposal, if such requests are made after the contract is awarded. One exception to this required disclosure is information which fits within the definition of a confidential trade secret [Government Code section 6254(k)] or contains other technical, financial or other data whose public disclosure could cause injury to the proposer's competitive position. If any proposer believes that information contained in its response to this Request for Proposal should be protected from disclosure, the proposer **MUST** specifically identify the pages of the response that contains the information by properly marking the applicable pages and inserting the following notice in the front of its response:

***NOTICE:*** *The data on pages \_ of this response identified by an asterisk (\*) contain technical or financial information, which are trade secrets, or information for which disclosure would result in substantial injury to the proposer's competitive position. Proposer requests that such data be used only for the evaluation of the response, but understands that the disclosure will be limited to the extent the County considers proper under the law. If an agreement is entered into with the proposer, the County shall have the right to use or disclose the data as provided in the agreement, unless otherwise obligated by law.*

The County will not honor any attempt by proposer to designate its entire proposal as proprietary. If there is any dispute, lawsuit, claim or demand as to whether information within the response to the Request for Proposal is protected from disclosure under the Act, proposer shall indemnify, defend, and hold harmless, the County arising out of such dispute, lawsuit, claim or demand.

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**PROPOSAL FORMAT**

A qualifying proposal must address all of the following points:

1. Project Title
2. Applicant or Firm Name
3. Firm Qualifications
  - a. Type of organization, size, professional registration and affiliations.
  - b. Names and qualifications of personnel to be assigned to this project.
  - c. Outline of recent projects completed that are directly related to this project. Consultant is required to demonstrate specific expertise relating to the requirements of the Project Scope.
  - d. Qualifications of consultants, subcontractors, or joint venture firm, if appropriate.
  - e. At a minimum, five (5) Client references from recent related projects, including name, address and phone number of individual(s) to contact for referral. At least two (2) of those references should be from local governmental agencies located within California.
4. Understanding of and Approach to the Project
  - a. Summary of approach to be taken.
  - b. Description of the organization and staffing to be used for the project.
  - c. Indication of information and participation the proposer will require from County of San Luis Obispo staff.
  - d. Indication of time frame necessary to complete the project once a Notice to Proceed is issued.
5. Fees and Insurance
  - a. Propose total fees to complete project as described under Project Scope.
  - b. The selected Consultant will be required to provide insurance coverage in the amount of \$1,000,000 General Liability Insurance and \$1,000,000 of Professional Liability Insurance. This amount of insurance coverage shall be reflected in your estimated professional fee.
  - c. The Consultant shall provide within five (5) days after the Notice of Award is issued a certificate of liability insurance naming the County of San Luis Obispo and its employees and officers as additionally named insured. This shall be maintained in full force and effect for the duration of the contract and must be in an amount and format satisfactory to the County of San Luis Obispo.

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- d. Indemnification: Consultant shall defend, indemnify and hold harmless the County of San Luis Obispo, its officers and employees from all claims, demands, damages, costs, expenses, judgments, attorney fees, liabilities or other losses that may be asserted by any person or entity, and that arise out of or are made in connection with the acts or omissions relating to the performance of any duty, obligation, or work hereunder. The obligation to indemnify shall be effective and shall extend to all such claims and losses, in their entirety, even when such claims or losses arise from the comparative negligence of the County of San Luis Obispo, its officers and employees. However, this indemnity will not extend to any claims or losses arising out of the sole negligence or willful misconduct of the County of San Luis Obispo, its officers and employees.

The preceding paragraph applies to any theory of recovery relating to said act or omission, by the Consultant, or its agents, employees, or other independent contractors directly responsible to Consultant including, but not limited to the following:

1. Violation of statute, ordinance, or regulation.
2. Professional malpractice.
3. Willful, intentional or other wrongful acts or failures to act.
4. Negligence or recklessness.
5. Furnishing of defective or dangerous products.
6. Premises liability.
7. Strict Liability.
8. Violation of civil rights.
9. Violation of any federal or state statute, regulation, or ruling resulting in a determination by the Internal Revenue Service, California Franchise Tax Board or any other California public entity responsible for collecting payroll taxes, when the Consultant is not an independent contractor.

It is the intent of the parties to provide the County of San Luis Obispo the fullest indemnification, defense, and "hold harmless" rights allowed under the law. If any word(s) contained herein are deemed by a court to be in contravention of applicable law, said word(s) shall be severed from this contract and the remaining language shall be given full force and effect.

## **PROJECT SCOPE**

### **Summary**

The County of San Luis Obispo is currently soliciting proposals for a firm to provide State lobbyist and advocacy services. The duration of the contract is open to negotiation with extensions based upon performance reviews.

### **Overall Program Guidelines**

The County of San Luis Obispo is seeking an agency or agencies that can demonstrate an ability to provide representation to legislative and administrative agencies in Sacramento on specific issues and interests to local government.

Specifically, your agency will be evaluated on your experience, process and procedures for providing local government the services listed below. Your response to this request for proposal should include specific examples of your procedures and processes for providing these services.

### **Representation**

1. Provide assistance in the development of the County's annual legislative platform;
2. Report major legislative/regulatory changes as they specifically affect the County;
3. Represent the County's specific interest with the legislature and administrative agencies;
4. Sponsor, support, amend or oppose legislation or regulations that benefit the County. Please provide examples of specific legislation that your agency has facilitated sponsorship of and the outcome.

### **Information**

1. Provide regular (weekly and/or monthly) reports on legislative or regulations affecting the County;
2. Respond to any questions from the County's Board of Supervisors, County Administrator, or designated County official;
3. Provide specific analysis of legislation or regulations as to impact on the County;
4. Respond to the California State Association of Counties (CSAC) inquiries relating to impacts that specific legislation or regulations may have on the County;
5. Assist County departments on means to maximize State and Federal funding of County programs;

### **Access**

1. Facilitate access to legislators, including the County's delegation, legislative staff, and key administrative officials for the Board of Supervisors, County Administrator and department heads and/or designee staff;
2. Facilitate access to other organizations and associations to assure the County's input into issues that impact and/or are beneficial to the County.

### **Training**

1. Provide training of designated County staff in legislative and regulatory processes to maximize County resources;

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2. Provide training in process to implement both legislative and regulatory changes.

Cooperation with California State Association of Counties (CSAC)

1. With the County's input, complement and cooperate with the legislative and regulatory efforts of the California Association of Counties.

Program Estimated Budget

Your proposal should include the estimated number of hours per month, along with your agency's hourly rate, that would be required to provide the activities contained in the Project Scope.

Any travel costs (hotel, meals, mileage) should be calculated using the County of San Luis Obispo's approved per diem rates per the County's Travel Policy (attached).

Proposal Evaluation Criteria

1. Amount of the proposed fee for service;
2. Understanding of the nature of services desired by the County of San Luis Obispo;
3. Experience in performing the type services desired by the County of San Luis Obispo;
4. Responsiveness to the RFP and completeness of the proposal

The Selection Committee, in its sole discretion, may assign rating weights to the above criteria. The Committee may also consider any other factors that it considers relevant to making its recommendations.

Estimate Project Schedule\*

The County of San Luis Obispo estimates the initial project schedule to be:

September 2, 2010	RFP released
October 15, 2010	Proposals due
Week of October 25, 2010	Proposals reviewed and top finalists selected
Week of November 29, 2010	Top finalists interview with County Administrator and/or Board of Supervisors;
January 11, 2011	Board of Supervisors awards contract
Unknown	Selected agency or agencies performance review and/or contract renewal or extension – Length of contract will determine performance evaluation and/or renewal or extension

**\*Dates subject to change without notice at the sole discretion of the County**



## California State Lobbyist and Advocacy Services

**County Travel Policy (Exhibit A)**  
**GUIDELINE TO MILEAGE REIMBURSEMENT RATES**

The County follows the IRS reimbursement rates for mileage. The mileage reimbursement rate effective January 1, 2010 is \$.50 per mile.

**GUIDELINES TO MEAL AND HOTEL/MOTEL RATES**

The following travel reimbursement rates are effective as of February 6, 2007, for all individuals traveling under the County Travel Policy. These rates shall remain in effect until modified by the Board of Supervisors. Under special circumstances, the guideline rates may be exceeded by up to 50% upon approval of the Auditor-Controller. Department heads must submit prior written justification for lodging expenses to the Auditor-Controller supporting their request for an exemption to these rates.

**MEALS**

Meals must be claimed at the actual amount spent up to the maximum allowable amounts as follows:

Breakfast	\$12.00
Lunch	15.00
Dinner	27.00

The County is not on a per diem system, but rather reimburses for each meal on an individual basis according to the following time criteria:

<u>Meal</u>	<u>Travel must begin before</u>	<u>or</u>	<u>end after</u>
Breakfast	7:00 a.m.		8:00 a.m.
Lunch	11:00 a.m.		1:00 p.m.
Dinner	5:00 p.m.		6:00 p.m.

**HOTEL/MOTEL RATES**

The maximum room rates allowed for an individual on official County business as described in the Travel Policy are as follows:

- a. Single room rate - \$150.00 plus tax and parking.
- b. Double or multiple room rates - \$200.00 plus tax and parking. This rate is applicable only when all individuals sharing the room are authorized personnel eligible for reimbursement.
- c. High Cost Area -\$190.00 \*\* (Single occupancy) plus tax and parking.

\*\*High cost areas:

(1) For hotels in the San Francisco Bay area, greater San Diego area, downtown Los Angeles, coastal areas of Los Angeles, Monterey, and Orange County

(2) In order to save time and local transportation and parking costs, this rate may also be appropriate for employees staying at conference host hotels. Employees shall seek, and shall be reimbursed for, accommodations that are of good quality and in reasonable proximity to the place where the employee is to conduct County business. Reimbursement will not be made for luxury accommodations.

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**LODGING HIGH COST AREAS**

AREA/CITY	INCLUDES THESE CITIES	SPECIFIC DATES
Alameda County	Oakland, San Leandro, Berkeley	
Contra Costa County	Concord, Martinez, Richmond	
LA Coastal	Malibu, Santa Monica, Redondo Beach Manhattan Beach, Palos Verdes area	
LA Downtown	Wilshire Blvd, Santa Monica Blvd area	
Marin County	San Rafael, Sausalito, Novato	
Napa County	Napa, Calistoga	
Monterey Coastal	Carmel, Carmel Valley, Monterey May-	October
Orange County Coastal	Long Beach, Huntington Beach, Laguna Beach, Newport Beach, Costa Mesa, Dana Point, San Clemente	
Palm Springs		January-May
San Diego Co. Coastal	San Diego, Coronado, La Jolla, Carlsbad, Oceanside, Encinitas	
San Francisco Bay	San Francisco, Half Moon Bay, San Mateo, Redwood City	
Santa Barbara		
Santa Clara Area	Palo Alto, Mountain View, Sunnyvale, San Jose Los Altos, Menlo Park	
Santa Cruz		
South Lake Tahoe		June-August
Yosemite	Fish Camp	May-Sept
<u>Areas Outside California</u>		
Boston, Cambridge		
Chicago		
Jackson Hole, WY		
New York City		
Philadelphia		
Seattle		
Washington DC, Alexandria VA		
Prince George MD		